

Phoenix Project
Process Definition – General Ledger

Process	<i>Inactivating Organizations</i>
Process Number	<i>GL – 039</i>

Description of Process

Inactivate an existing organization. Once an organization is no longer needed for entering transactional data, it can be inactivated. If the organization is selected on a transaction line *after* being inactivated, the transaction will fail the edit process and be marked in error. The transaction will then need to be corrected. Organization values represent any divisional breakdown of an entity into operating units such as different bureaus in state government. In combination with other ChartField values, they form the basis for organization budgets that track expenditures and revenues. The State of Georgia will create Organization values at the Business Unit SetID level, which will include Activities as well as true Organizations.

Input to Process

Organization Change Request is written up, signed, assigned an identifier and approved. The organization is then entered into PeopleSoft.

Output of Process

Organization is inactivated and is no longer accessible to any business units.

Service Level Agreement Required? (if yes, provide a brief description)

N/A

PeopleSoft Panel Groups being Used

Function	Panel Group
Use	Organization

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Business Process Description

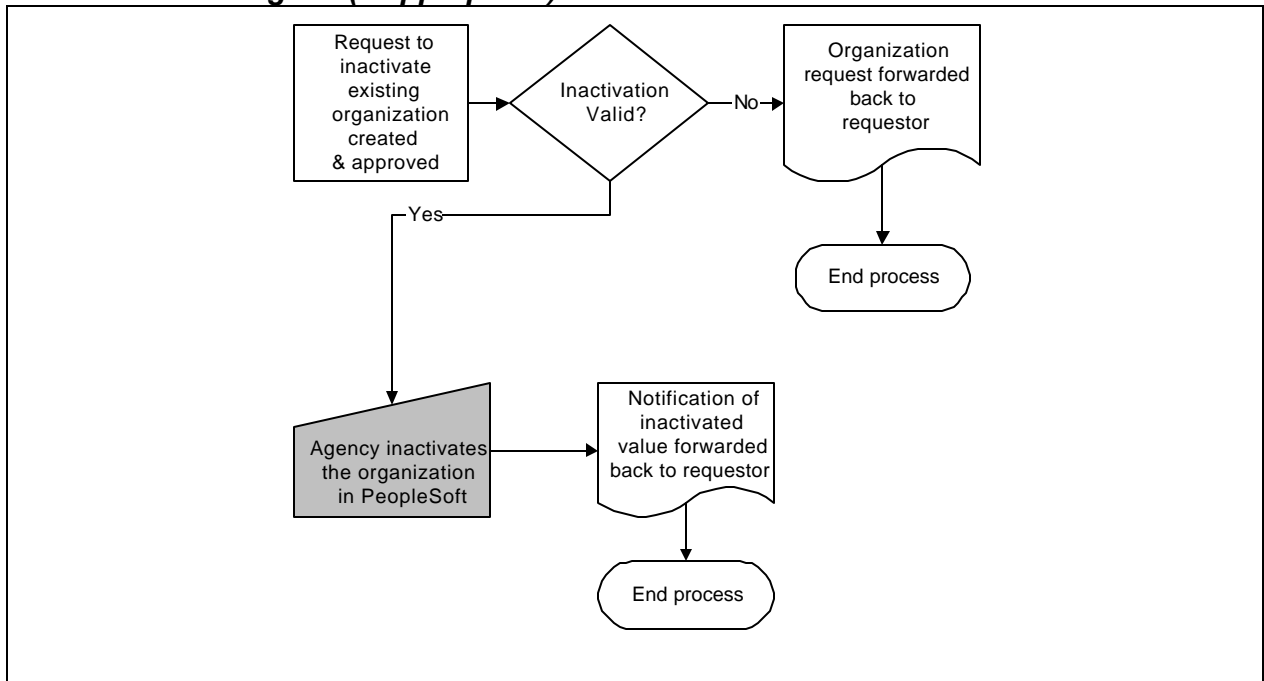
Process Description	Responsibility (Agency/Centralized)
<p><u>Step 1: Complete request form to inactivate an organization</u></p> <p>Using the forms provided to you, submit your request to the individual authorized to approve organization changes, usually someone at a supervisory level. If valid, the request will be input at the agency level. Otherwise, the request will be returned to you for corrective action or with an explanation for the denial of the request.</p>	Agency
<p><u>Step 2: Open the organization you wish to inactivate</u></p> <p>Using Update/Display mode, enter the SetID and Organization Code for the organization you wish to inactivate.</p>	Agency
<p><u>Step 3: Inactivate your organization</u></p> <p>Insert a row using F7 in any effective dated field. This allows you to make <i>effective dated</i> changes and enables you to retain a history of the modifications made to the organization. Any modifications will take effect as of the date specified.</p> <p>In the row you just inserted, enter the Effective Date and Status for your organization. The Effective Date can be set to the current date or a future date and determines the date on which the change will go into effect. The Status refers to the availability of the organization for use in journal processing. Using the drop down list provided, change the Status to "Inactive."</p>	Agency
<p><u>Step 4: Save the organization</u></p> <p>The organization is now inactivated and will no longer be accessible to any users. If you want to re-activate the organization at a later point in time, follow steps 1- 3 above and change the status back to "Active."</p>	Agency
<p><u>Step 5: Notify the requestor that the organization has been inactivated</u></p> <p>Send notification to the requestor that the organization has been inactivated and is no longer available for use. The following are acceptable forms of notification:</p> <ul style="list-style-type: none"> • E-mail • Facsimile • Interoffice Memorandum 	Agency

Forms Used with Process (#)

**Attach sample form(s) [Organization Change Request.doc](#)

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Process Flow Diagram (if appropriate):



Process Signoff

Tested By
Date Tested